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Nuanced and Timely: Capturing Collections Feedback at Point of Use

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UNIVERSITY LIBRARIES

Nuanced and Timely: Capturing Collections Feedback at Point of Use

Online Northwest 2014,
Snowstorm Edition

Rick Stoddart, OSUL&P
Jane Nichols, OSUL&P
Terry Reese, OSU

Thank you for coming; in right place; I'll be talking about a project the 3 of us have been working on to test a point of use survey tool. Rick is joining us via video and Terry was not able to come. So what I hope to do is present for about 20 minutes and then leave the rest of the time for questions and discussions. We'll kick it off with Rick's short introductory remarks.

pro-to-type

/ˈprōtəˌtīp/

noun

noun: **prototype**; plural noun: **prototypes**

1. a first, typical or preliminary model of something, esp. a machine, from which other forms are developed or copied.

"the firm is testing a prototype of the weapon"

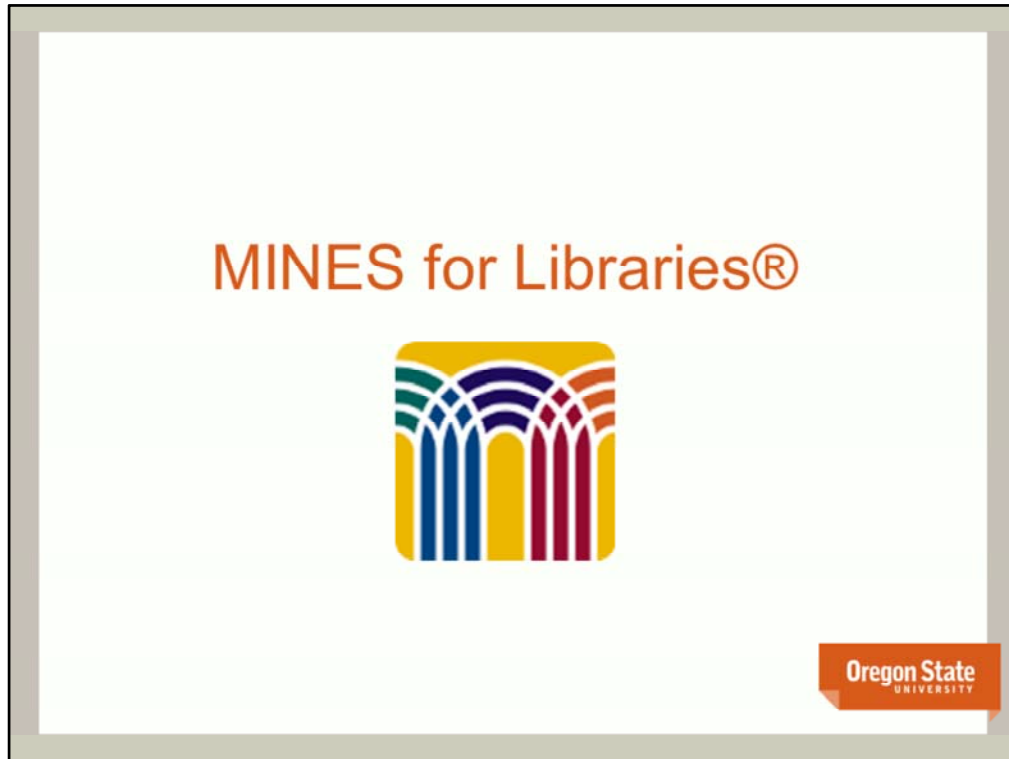
synonyms:

original, first example/model, master, mold, template,

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This is a prototype both in the use of the code, the survey construction, and methodology of deployment.

As such we are going to gather some feedback from you – you are kind of a “focus group” for us.



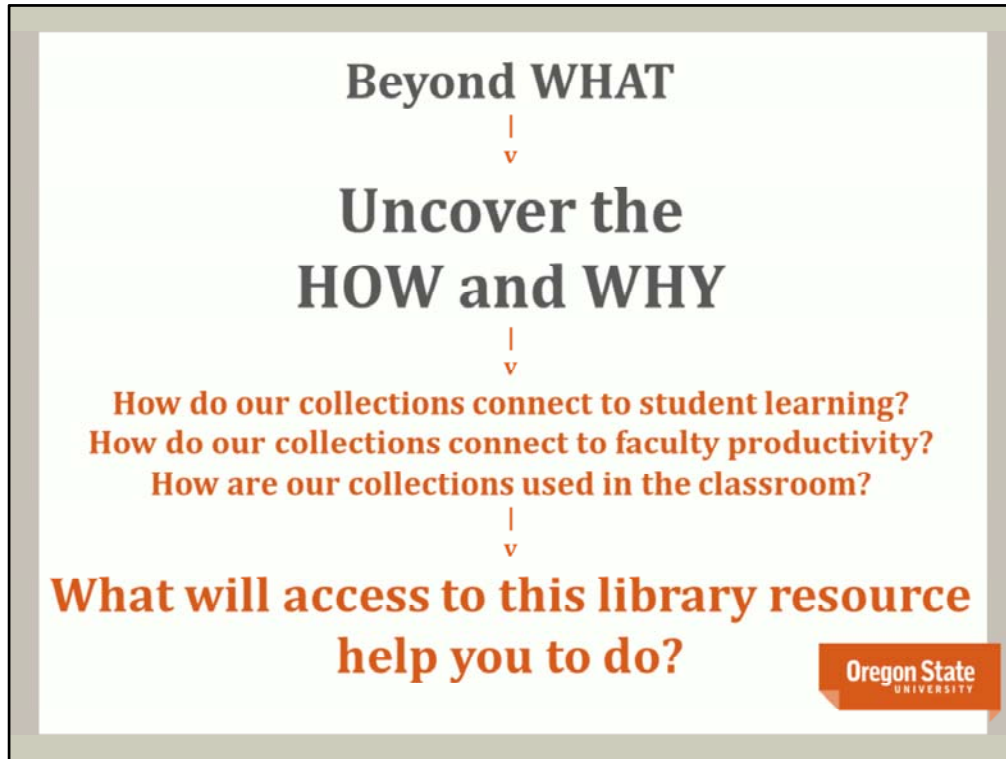
Inspired by...

Three times... this last time time Terry crafted some code that inserted the survey within the proxy process. It occurred to the library that we could use this code in a similar manner to gather feedback from specific library resources.

Activity: Think - Pair - Share

If you were able to have a pop-up survey before selected electronic resources...

- *What would ask?*
- *What specific collections would you target and why?*
- *What would you be able to do with the results? (How would you use this evidence?)*



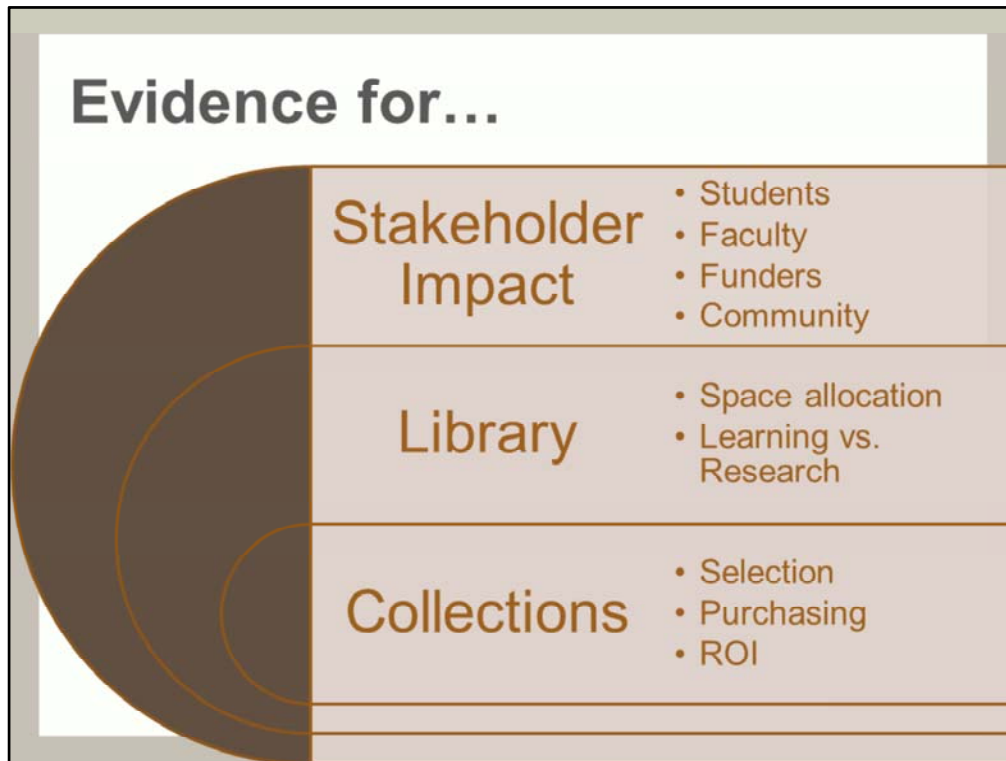
So my role in this is to articulate some of the big pictures connections.

We often talk about USE as a measure for collections but that often boils down transaction numbers such as circulation statistics and downloads that provides information about WHAT they are using but limited information about HOW or even WHY our collections are being used. This project attempts to fill in some of these blanks. This point of use survey incorporates a qualitative question asking **How will access to this library resource help you to do?** and we have seen answers such as Complete a Class Assignment, Complete a dissertation or Provide Readings for my Students. Responses such as this help connect the collection to the curriculum, to research, and to student needs. And tell a bigger story beyond simply usages through article downloads.

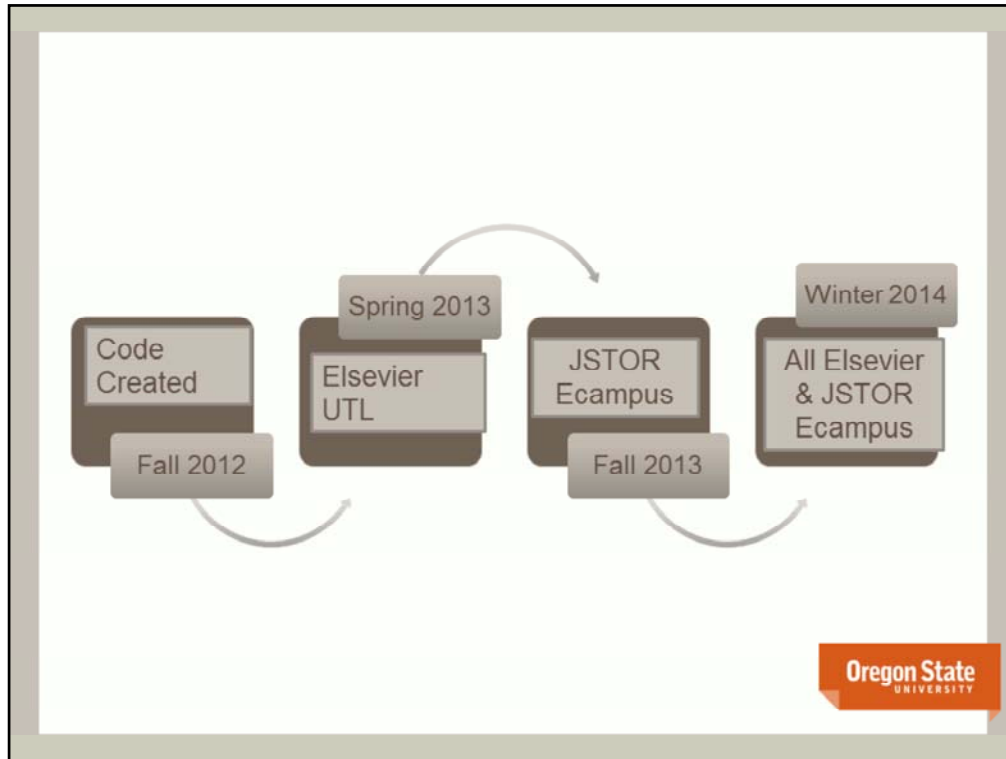
It is these Broader Impacts with students, faculty and other stakeholders that libraries are being pressured to better articulate. We may intuitively know the answer to some of these questions such as... (read questions) -- but a survey tool or research project like this can help provide evidence to support our understanding and allow us to make evidence-based decisions about how best to tell the story of the library's with stakeholders. For example, as we gather more evidence, it might be possible for the library to better advocate to university administrators about our role in supporting grant funded faculty research on campus.

Beyond asking what access to the collection allows you to do -- the survey also asks the

respondents to put a monetary value on accessing the article as well as how long they would be willing to wait for access (immediately, within 24 hours, 1 day, etc.). This places a dollar and time value on the collections from a patron perspective that we didn't often have. This provides not only information for collection development but also give sense of how students and faculty value access to our collections. Is the perceived value of immediate access to our collections the same for both librarians and patrons? This is something the survey hopes to find out.



1. collection development, purchasing, and ROI



We wanted to test the software, survey questions and survey design across several iterations so we could apply what we learned from earlier iterations to later ones.

The spring after Terry created the code, we conducted our first round with our Elsevier UTL unique title list; because it is a well-defined journal list of that gets a lot of use by our patrons. This fall after revisions to the code, the survey and the survey design we tested the pop-up survey software again but focused on JSTOR journal titles acquired due to a gift from our Ecampus. Finally, this January we tested it on both the Elsevier titles; this time expanded to include all titles we have access to as well as the JSTOR Ecampus titles.

Now that you have a broad picture of how we deployed the survey; let's look at it from a survey respondent's perspective.

E-JOURNALS

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Title begins with

Search

-- Please select a subject cate

Search

1 record retrieved for the search: Title begins with "Journal of anthropological research"

Journal of anthropological research (0091-7710) [Look up Article](#) [More full text options](#)
from 04/01/1973 to 12/31/2010 in [JSTOR Arts & Sciences VII Archive Collection](#)
from Spring 2005 to present in [Single Journals](#)

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The next few slides show what the user encounters. For each iteration of the survey, the survey was programmed to display when users navigated to our e-journal list or...

ScienceDirect Journals Books Sign in Help

Search all fields Author name Journal or book title Volume Issue Page **Advanced search**

2,926 articles found for: ("library science") [AI Sources/Arts and Humanities/Social Sciences]

Edit this search Save this search Save as search alert RSS Feed

Go to page: 1 of 118 Go Next

Search within results

Search

Refine results

Limit to Exclude

Publication

- ☐ Journal (2,869)
- ☐ Book (59)
- ☐ Reference Work (4)

Journal/Book Title

- ☐ The Journal of Academic Librarianship (486)
- ☐ Information Processing & Management (387)
- ☐ International Library Review (358)

1 Theory talk in the library science scholarly literature: An exploratory analysis Original Research Article
Library & Information Science Research, Volume 35, Issue 2, July 2013, Pages 175-190
Karl D. Kumasi, Deborah H. Charbonneau, Dian Walster
Show preview PDF (342 K) Recommended articles Related reference work articles

Graphical abstract


Minimal (M¹) Moderate (M²) Major (M³)

← Theory Dropping Theory Diversification Theory Application
Theory Positioning Theory Conversation Theory Generation
Theory Testing →

2 Seats at the table: The network of the editorial boards in Information and library science Original Research Article
Journal of Informetrics, Volume 5, Issue 3, July 2011, Pages 382-391
Alberto Bacconi, Lucio Barabesi
Show preview Recommended articles Related reference work articles

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a database or discovery tool. After the user selected a citation from a targeted journal, then the...


OSU Libraries

Consent Statement
 You are invited to participate in OSU Libraries anonymous survey evaluating the usefulness of library resources. Complete this form & then tell us what you think.
 I volunteer to participate in a Collection Assessment Survey conducted by Jane Nichols and Rick Stoddart from Oregon State University Libraries & Press and Terry Reese of The Ohio State University Libraries. I understand that this survey

- tests whether a software application that generates a pop-up survey when electronic resources are clicked works as intended and,
- will ask about my reasons for selecting this resource

My participation is voluntary. I may withdraw and discontinue participation by leaving the survey website at any time without penalty. The survey will take about 1-5 minutes. There are no foreseeable risks, discomforts or direct benefits to me. I understand that the researchers will not identify me by name in any reports, publications or presentations using information from this survey and that my confidentiality as a participant in this study will remain secure. I agree to the use of anonymous quotations in publications resulting from this survey. Subsequent uses of records and data will be subject to standard data use policies, which protect the anonymity of individuals and institutions. To preserve my anonymity, my IP address will be removed before the researchers see survey responses and my name will not be collected. Aggregate data will be shared with software application programmers. This study has been reviewed and approved by the Institutional Review Board (IRB) Office at Oregon State University. If you have questions about your rights or welfare as a participant, please contact the Oregon State University IRB Office, at (541) 737-8008 or by email at IRB@oregonstate.edu.

I am over 18 years of age.

Yes ☐

No ☐


I have read and understand this explanation and voluntarily agree to participate in this study.

Yes ☐

No ☐

If I have any questions, I will contact either:

Jane Nichols Oregon State University Libraries and Press jane.nichols@oregonstate.edu	Rick Stoddart Oregon State University Libraries and Press richard.stoddart@oregonstate.edu
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121 The Valley Library, Corvallis OR 97331-4501 | Phone: (541) 737-3331 | Hours
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IRB form displayed and if they agreed to take the survey they were presented with the questions.

Collect Assessment Survey


We're evaluating the usefulness of library resources, please tell us what you think by selecting the appropriate boxes.

Are you using this resource for
(Required-Choose all that apply)

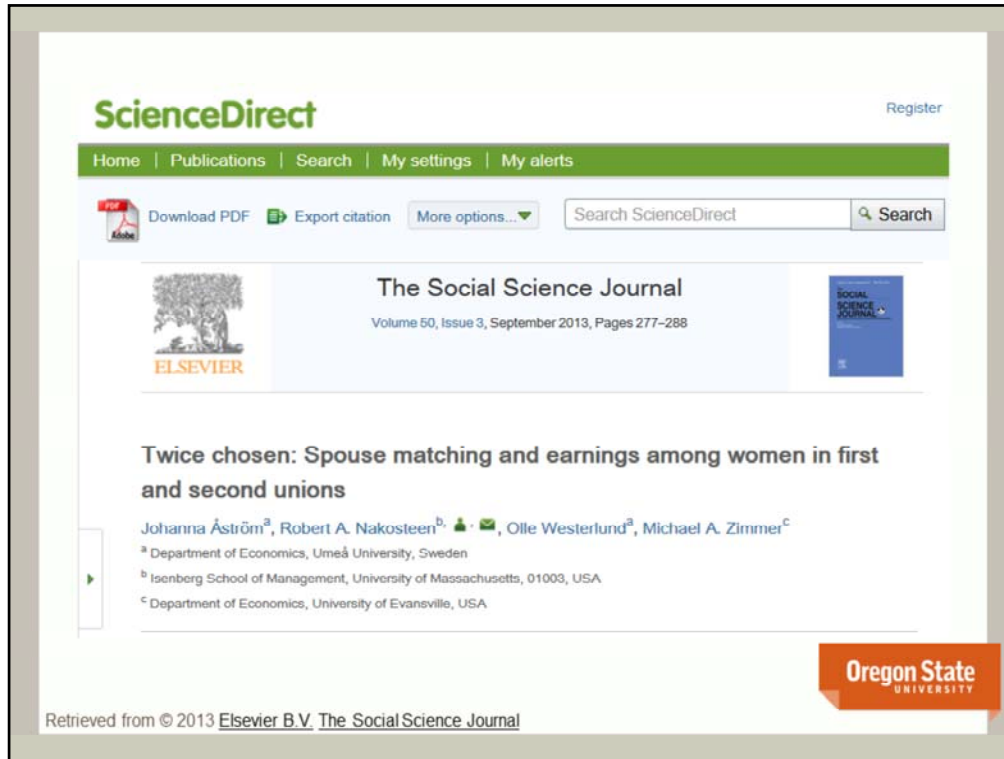
For homework/course assignment(s)	<input type="checkbox"/>
To assist a student	<input type="checkbox"/>
Curriculum development/instruc	<input type="checkbox"/>
My research	<input type="checkbox"/>
Other	<input type="checkbox"/>
Comment	

This resource is
(Required-Choose all that apply)

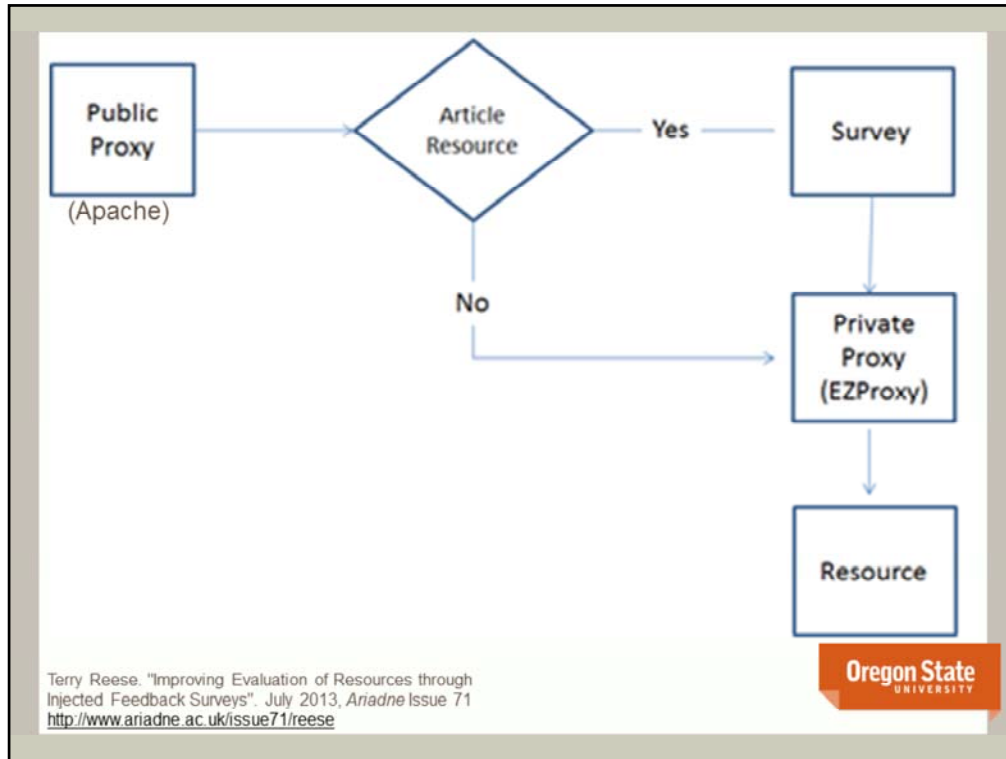
Core to my course assignment(s)	<input type="checkbox"/>
Core to my research	<input type="checkbox"/>
Core to my teaching	<input type="checkbox"/>
Supplemental to course assignment(s)	<input type="checkbox"/>
Supplemental to my research	<input type="checkbox"/>
Supplemental to my teaching	<input type="checkbox"/>
I have not used this resource before	<input type="checkbox"/>
Other	<input type="checkbox"/>
Comment	



At this time the survey has a simple look and feel and design. Currently it works well with multiple choice questions like these as well as with open comment questions. After completing the survey...



the user is directed to their intended article. For anyone who chose no, they didn't want to respond to the survey, they were directed to their intended article.



Now that you have a feel for what the user sees. Let's take a look 'under the hood'. Key to the success of triggering the survey to pop-up at the journal level, is our proxy server. In OSU's case, we use EZProxy. For this survey infrastructure Terry also deployed a public proxy server on Apache. We're all familiar with using a proxy server from off-campus where you log in prior to getting to your article; that's what is meant in our case by a public proxy. In this workflow; an Apache proxy is added which plays the key job of a decision engine, driven by SQL rules and IP address. Based on the rules, the public proxy analyzes the users request for an article; determines if the person should be displayed a survey; displays the survey when appropriate and when not, sends them to their article. For the most part this works well and we are able to capture meaningful data. In the lessons learned and next steps, I share some tweaks that need to be made.

For further technical details I recommend Terry's article published in Ariadne. The citation is listed on this slide.



We wanted to share some of the responses we've gotten so far to give you a sense of the types of data that can be collected. I report on just a slice of all of the data collected. The next few slides are from the most recent round which surveyed all of our Elsevier titles and those acquired from JSTOR with the Ecampus gift.

The survey included 6 questions about use and 3 demographic questions. It ran 24 hours a day/7 days per week for 3 weeks. We captured 1364 total responses.

16% of the respondents were Faculty/Instructor/Researcher

27% of the respondents were Graduate students

53 % of the respondents were Undergraduates

	Faculty Instructor Researcher	Grad student	Undergraduate Other student Other
Core	15%	26%	57%
Supplemental	24%	35%	42%
Haven't used resource before*	3% (n=8)	34%	62% (n=29)

14
May 18, 2017

*37 people hadn't used the resource before

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One aspect of use we wanted to learn about was how core or not, patrons felt the targeted article was to their course assignment, research or teaching. Of the respondents who feel the resource is core, students led in this category. Additional analysis can be done to learn if the rate of students saying they feel the source is core is higher or lower than faculty or graduate students. I also think it makes sense that undergraduates opted to say they hadn't used the resource before so they didn't designate it as core or supplemental.

Undergraduate Students

Give my course assignment a resource.

I am currently gathering research articles on Schizophrenia from a neurological perspective for a research paper.

Finish my homework.

Complete my assignment.

Complete a discussion board assignment for an e-campus class.

I need this information to complete a term project. The information contained in this article is very specific and I need this type of specific information.

Here are comments to an open-ended question which asked what will access to this library resource help you to do. I picked examples representing the range of comments undergrad, grads and faculty gave.

Graduate Students

I am working on a literature review for my Master's project. This allows me to work from my home as opposed to the library (which is generally crowded with undergrads).

Fix a mixed up citation.

Needed for my dissertation research and my teaching.

Understand the use and applicability of a specific research tool.

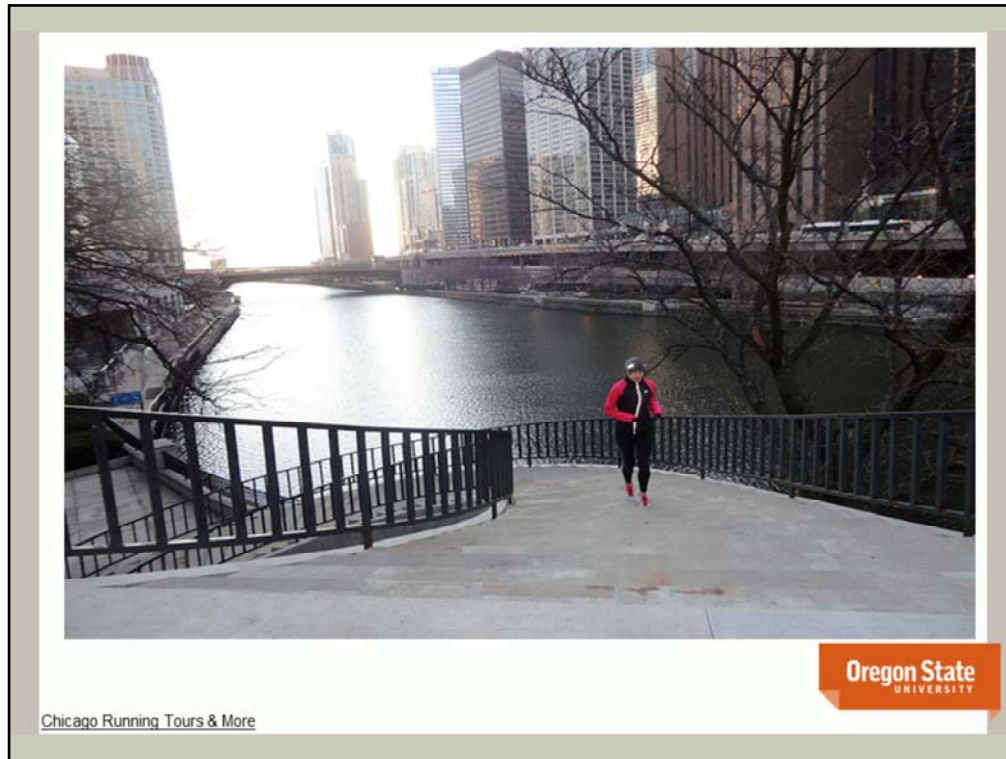
Complete an assignment, broaden my learning, open new avenues of investigation.

Create a higher quality research product.

Get reliable information about topics I know little of.

Faculty
Create a syllabus for core course for a recently-approved PhD program in WGSS.
Get funded proposals so the library can take its cut out of the overhead and then be able to get more books and better online access and grow.
Keep up with current research in my area and quickly access needed articles.
Access is absolutely essential to my research, especially since I am a faculty member who is not on campus.
Speed up my writing.
Tenure and promotion.
Complete publications on research projects in progress.

It's fascinating to see how important the resources are to the individual's need and to the university's core mission: education and research. We suspect that being able to capture these types of comments would be very helpful for a variety of library purposes such as collection development decisions and demonstrating the value an academic library has to its parent institution.



While the findings seem very promising, I want to share a few lessons learned from our successive rounds and some next steps.

First, we know we'd like to make changes to our survey design. For example, we'd like to ask fewer questions. A total of 9 questions is still longer than what we prefer. One possible solution is to alternate questions, for example in one round ask a question about core-ness and in another ask about purpose of use.

Another lesson or challenge is to prevent patrons from receiving the survey multiple times. We have several options to try such as only deploying it for a short time frame such as one hour per day for one week. Or, we could limit the number of responses to a given journal, where once we get 5 responses, the survey is turned off.

We could explore if capturing existing data from proxy server would suffice for our assessment needs.

For our next steps we know will employ some of the options above to resolve duplicate responses, we will revise survey questions based on existing responses and Terry Reese is looking at how he might use Qualtrics API. Qualtrics has a pop-up distribution option that looks very nice where you can paste code into your web site, includes animation and takes advantage of Qualtrics full survey backend. However where this differs is what triggers the

survey to pop-up; with Qualtrics you would have to figure out how to launch the survey at the journal level.

The screenshot shows the GitHub interface for the repository 'reaset / ics'. At the top, the GitHub logo is on the left, and navigation links 'Explore', 'Features', 'Enterprise', and 'Blog' are on the right. Below the repository name, it says 'Oregon State University's MINES/collection management intercept survey code'. The repository statistics show 5 commits, 1 branch, 0 releases, and 1 contributor. The 'branch: master' is selected. A table of commits is displayed, with the latest commit 'Update README.md' by 'reaset' 6 months ago. The commit history table is as follows:

File	Commit Message	Author	Time
efg	Updating for running custom surveys	reaset	6 months ago
html	Updating for running custom surveys	reaset	6 months ago
lib	Updating for running custom surveys	reaset	6 months ago
.gitattributes	Initial commit	reaset	11 months ago
.gitignore	Initial commit	reaset	11 months ago
License	Create License file	reaset	11 months ago
README.md	Update README.md	reaset	6 months ago
login.php	Updating for running custom surveys	reaset	6 months ago

On the right side, there are links for 'Code', 'Issues', 'Pull Requests', 'Pulse', 'Graphs', and 'Network'. Below these, the 'HTTPS clone URL' is provided as 'https://github.com/reaset/ics'. At the bottom, there are buttons for 'Clone in Desktop' and 'Download ZIP'. An orange banner at the bottom right features the 'Oregon State UNIVERSITY' logo.

Code <https://github.com/reaset/ics>

I mentioned Terry's article earlier, now I'd like to share where the initial code release is. He is open to partners to develop it and for sharing data. If you are interested we have contact information in the last slide. Now that you have a good sense of the tool, how it works and what data it can capture, Rick will lead us in a discussion.

Questions for you

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We're going to turn this around a bit – since you are our mini-focus group – normally in presentations they let you ask us questions (and we'll get to that) but first we want to ask you some questions to crowd source improvements to our prototype.

**If you could only ask
one question on the
survey what might it
be?**

**What are some ideas
to improve the
design/methodology
of this survey/project?**

**What are some
strategies to balance
the annoyance factor of
surveying electronic
resources?**

Access vs. Annoyance

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**How many survey
responses would you
need about a single
journal title to make an
informed decision?
5, 10, 25, 100...**

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Or your supervisor would need?

Informs the methodology about how often survey would appear,

What evidence about collections does your...

...supervisor value?

...library administers value?

...collection development value?

...campus decision-makers value?

...faculty value?

...stakeholders value?

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Informs type of questions to include on the survey

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Terry Reese

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Contact us for questions.